Freedman Financial

How to Prepare for Your Initial Consultation

Thank you for this opportunity to introduce our firm to you.

Freedman Financial has been providing independent, objective financial planning and investment advice to individuals and families living on the North Shore, Merrimack Valley and surrounding communities since 1968.

Your decision to schedule an initial consultation is an important one and must be built on a foundation of trust. Whether you're seeking guidance on getting your financial house in order or simply exploring a second opinion of your existing financial plan, we'll be ready for you.

WHAT TO EXPECT

Generally, an initial consultation lasts 60 - 90 minutes where you'll meet privately with one a Certified Financial Profession™. This confidential conversation is complimentary and an opportunity for you to ask our CFP® questions and for us to learn more about your personal financial goals and objectives.

We encourage you to begin organizing your questions, as well as details pertaining to your financial life in advance. Our factfinder can be a helpful tool. Please fill it out as best you can prior to our meeting.

Many new clients also find it helpful to bring actual documentation to a meeting.

Here are suggested items to bring…

1. Your most recent tax return
2. Copies of current Investment, Retirement, Insurance and Bank Statements
3. Employee Benefit booklet(s)
4. One Month's Pay Stubs
5. Endorsement Pages for Life, Disability, Auto, Homeowners and Personal Insurance
6. Any Estate Planning Documents such as, Wills, Trusts, Powers of Attorney, etc.

Initial consultations can be scheduled by contacting our office at 978-531-8108 or emailing jodi@freedmanfinancial.com. Meetings are held between 8:30am and 5:00pm Monday – Friday.

On behalf of the entire team at Freedman Financial, thank you for your inquiry.

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